



# TeamSTEPPS Continuing Education (CE) Activities

## Course Coordinator Roles and Responsibilities



April 20, 2015

## CE Accreditation Provider - Postgraduate Institute for Medicine (PIM)



Postgraduate Institute  
for Medicine

- Effective 30 June 2015, our CE accreditation provider is the Postgraduate Institute for Medicine (PIM).
- PIM has been providing trusted independent CE for healthcare professionals since 1979 (for over thirty years) and is a recognized leader for jointly provided CE activities. PIM is nationally accredited to certify education and issue CE credit to a multidisciplinary audience of learners, including physicians, physician assistants, registered nurses, nurse practitioners, pharmacists, psychologists, dentists and social workers.
- PIM has been awarded Accreditation with Commendation (2012-2018) by the Accreditation Council for Continuing Medical Education (ACCME) and Accreditation with Distinction by the American Nurses Credentialing Center (ANCC), the highest recognition that is awarded by the ANCC's Accreditation Program.
- For more information on PIM, go to <http://www.pimed.com>.

# CE Accreditation Provider - Postgraduate Institute for Medicine (PIM)



Postgraduate Institute  
for Medicine

- By partnering with PIM, we will be able to offer a broad selection of CE credit.
  - **Accreditation Council for Continuing Medical Education (ACCME)** for Medical Doctors (MD), Doctors of Obstetrics (DO), Nurse Practitioners (NP), and Physician Assistants (PA).
  - **Accreditation Council for Pharmacy Education (ACPE)** for Pharmacists and Pharmacy Technicians.
  - **American Nurses Credentialing Center's Commission (ANCC)** for Registered Nurses.
  - **American Dental Association Continuing Education Recognition Provider (ADA CERP)** for Dentists and Dental Technicians.
  - **American College of Healthcare Executives (ACHE)** for Healthcare Executives.
  - **California Board of Behavioral Sciences (CBBS)** for Licensed Clinical Social Workers (LCSW); **Licensed Marriage and Family Therapists (LMFT)**; Licensed Educational Psychologists (LEP); Licensed Professional Clinical Counselors (LPCC); MFT Interns (IMF); Associate Clinical Social Workers (ASW); and Professional Clinical Counselor Interns (PCCI) in the State of California.
  - **International Association for Continuing Education and Training (IACET) Continuing Education Unit (CEU)** for students who do not meet any of the above qualifications.

# TeamSTEPPS Master Approval for Continuing Education Credit



- TeamSTEPPS Train the Trainer and Train the Staff activities are eligible for master approval for continuing education (CE) credit
- TeamSTEPPS Essentials is a one hour introductory activity NOT eligible for CE credit
- CE credit is granted for approved content through an annual Master approval process with subsequent Individual approval for each course
  - The activities must adhere to the approved agenda without deviation in timing or content
  - Individual course approval is granted only after the submission of the agendas a minimum of **30 DAYS** and
  - Bios/disclosures for each course a minimum of **TWO WEEKS** before the start date
- Course Coordinators are those personnel in the field who help facilitate the CE process for individual course approval
- Course Coordinators will be granted Instructor Access to the Online Registration Center to manage their training activities



Defense Health Agency

## TeamSTEPPS CE Processing Timeline

**PHASE 1: MASTER APPLICATION SUBMITTED (COURSE OWNER)**  
7 Weeks Before Course Date

Only complete packages will be reviewed. Incomplete packages will be kicked back for missing information and 7 week process starts over.

**PHASE 2: PIM REVIEWS APPLICATION (COURSE OWNER)**  
5 Week Process

Complete application packet MUST include the following:

**As the TeamSTEPPS Course Coordinator, your help is needed to meet the mandatory requirements and timeframes outlined in Phases 3 and 4 of the overall TeamSTEPPS CE Process**

- Application
- Final agenda with topic, and timing
- Completed, signed, and dated
- Bios/ Disclosures for ALL staff involved in the course
- This includes but is not limited to: Course Director, Co-Director (if applicable), all faculty, speakers, planning committee members, and all staff involved with creating course content)
- Completed evaluation/survey
- Budget
- No mention of continuing education credit approval is received

Review of application to ensure activity with learning objectives, course content

Review of financial assessment data to verify the need of the course

Review of Bio/Disclosure forms for commercial bias

Review of budget for fiscal oversight

Amount of educational hours for credit verified

Only if all application requirements have been met, will an approval letter and master course be approved

**PHASE 3: INDIVIDUAL COURSE APPROVAL (COURSE COORDINATOR)**  
30 Days – 2 Weeks Before Course Date

**30 DAYS BEFORE COURSE DATE**

Course coordinator contacts the Patient Safety Program CE Team at [pspcourses@bah.com](mailto:pspcourses@bah.com) to:

- 1) Submit agenda with date, location, content timing, and named speakers for each course
- 2) Request course website be built

**2 WEEKS BEFORE COURSE DATE**

- 1) If not already on file, bios/disclosures for all instructors/speakers/staff for each course must be submitted
- 2) Course registration website is opened for registration
- 3) All students register through the ORC

**IF THESE STEPS ARE NOT MET, CE'S WILL NOT BE AVAILABLE FOR STUDENTS**

**PHASE 4: MANDATORY COURSE ACTIONS (COURSE COORDINATOR)**  
On-site and post-activity

- 1) Course coordinator prints sign-in sheet from ORC, takes attendance each day on-site and validates date and time attendance taken
- 2) 48 hours after course closes, course coordinator validates attendance in ORC
- 3) 10 days after course closes, all attendees must complete and submit a post course evaluation in ORC
- 4) Within 30 days after course closes, CE's are issued to eligible attendees

# PHASE 3: INDIVIDUAL COURSE APPROVAL

## 30 Days Before Course Date



| INSTRUCTIONS   | TIPS & BEST PRACTICES TO ENSURE CE ELIGIBILITY   |
|--|--|
| <p><b>Step 1:</b> <u>30 days prior</u> to course start date, request course website from Patient Safety Program CE Team at <a href="mailto:pspcourses@bah.com">pspcourses@bah.com</a></p>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Please send all communications and requests to the Patient Safety Team at <a href="mailto:pspcourses@bah.com">pspcourses@bah.com</a></li> <li><input type="checkbox"/> Contacting PIM directly will delay your submission/response/assistance</li> </ul>   |
| <p><b>Step 2:</b> <u>30 days prior</u> to course start date, submit agenda using approved template with date, location, content timing, and named speakers for each course to the Patient Safety Program CE Team at <a href="mailto:pspcourses@bah.com">pspcourses@bah.com</a></p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure the agenda does not differ from the approved TeamSTEPPS content, if it does not match the course becomes ineligible for CE credit. Your Service Rep will provide the agenda to you.</li> <li><input type="checkbox"/> Please plan ahead – if the agenda is not received 30 days prior to the course start date, the course becomes ineligible for CE credit</li> </ul>  |
| <p><b>Step 3:</b> <u>Two weeks prior</u> to course start date, all bios/disclosures for all speakers for each course must be submitted<br/> <i>*Note: Bios/disclosures are meant to ensure there is no commercial bias in the activity</i></p>                                     | <ul style="list-style-type: none"> <li><input type="checkbox"/> If an instructor does not already have an active bio/disclosure on file, information on how to submit will be emailed to all instructors based on the agenda information you submit in step 2 above</li> <li><input type="checkbox"/> If not already on file, all bios/disclosures must be received a minimum of TWO weeks prior to start date to be eligible for CEs</li> <li><input type="checkbox"/> Bios/disclosures must be submitted for ALL instructors, speakers and planning staff and are good for one year – please note that the use of expired bios will delay the process and risk CE eligibility</li> <li><input type="checkbox"/> Please submit bio/disclosures for any potential speakers, having them on file will help expedite approval</li> </ul> |
| <p><b>Step 3:</b> Patient Safety Program CE Team opens course registration website</p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Website will not be opened if all bios/disclosure are not submitted</li> </ul>   |
| <p><b>Step 4:</b> All students must register through the ORC</p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> The CE Team will provide the proper link to the Course Coordinator once the registration website has been built</li> </ul>   |

# PHASE 4: MANDATORY COURSE ACTIONS

## On-site and post-activity



| INSTRUCTIONS   | TIPS & BEST PRACTICES TO ENSURE CE ELIGIBILITY  |
|--|---|
| <p><b>Step 1:</b> <u>Daily</u> Course Coordinator validates attendance every day</p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Print on-site attendance sheets from ORC and verify students name, email, Service, type of CE certificate requested (incl. NABP# and DOB for ACPE)</li> <li><input type="checkbox"/> Communicate any changes from the sign-in sheet to the Patient Safety Program CE Team at <a href="mailto:pspcourses@bah.com">pspcourses@bah.com</a> immediately to ensure accuracy</li> <li><input type="checkbox"/> Attendance must be taken every day of course and validated with date and time on the sign-in sheet</li> <li><input type="checkbox"/> Students must attend all content contact hours – those who arrive late, depart early, or miss any segments of the training become ineligible for CE credit</li> </ul> |
| <p><b>Step 2:</b> <u>48 hours</u> after course closes, course coordinator validates attendance in ORC</p>                        | <ul style="list-style-type: none"> <li><input type="checkbox"/> Attendance must be validated in the ORC within 48 hours of course completion using the data from the sign-in sheets - failure to do so will prevent attendees from obtaining their CE credit</li> </ul>   |
| <p><b>Step 3:</b> <u>10 days</u> after course closes, all attendees must complete and submit a post course evaluation in ORC</p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Mandatory post activity evaluations must be completed and submitted within 10 days of course completion - failure to do so will prevent attendees from obtaining their CE credit</li> <li><input type="checkbox"/> Duke will audit attendance, agenda, bios/disclosures, and evaluation submission for compliance</li> </ul>  |
| <p><b>Step 4:</b> <u>30 days</u> after course closes, CEs are issued to eligible attendees</p>                                   | <ul style="list-style-type: none"> <li><input type="checkbox"/> If all accreditation requirements above are met, CE certificates will be issued within 30 days</li> </ul>   |

# Primary Risks to CE Eligibility

**Avoid these “misses” to ensure your course’s eligibility!**



**Missed Deadlines:** The main risk to CE eligibility for your course is not submitting required documentation in a timely manner. Please be mindful of the timelines for agendas (minimum of **30 DAYS** prior to course start date), bio/disclosures (minimum of **TWO WEEKS** prior to course start date), attendance validation (**48 HOURS** after course closes), and attendee evaluation (**10 DAYS** after course closes).

*\*Note: Not following the mandatory timing and requirements puts Master TeamSTEPPS CE accreditation as a whole at risk!*

**Missing Documentation:** The CE approval process follows rigorous protocols. To ensure accreditation compliance, ALL of the following documentation must be provided to ensure CE eligibility: agendas, bios/disclosures, attendance, evaluation submission, and the dates these items are submitted.

*\*Note: Our accreditation partner Postgraduate Institute of Medicine (PIM) conducts regular audits of these requirements to ensure CE compliance. Not following the mandatory timing and requirements puts Master TeamSTEPPS CE accreditation as a whole at risk.*

**Misdirected Communications:** Please avoid contacting PIM directly – this will delay your submission/response/assistance. The Patient Safety Program CE Team is happy to assist with any and all questions related to the CE process. You may contact us directly at [pspcourses@bah.com](mailto:pspcourses@bah.com).



## Questions?

Contact the Patient Safety Program CE Team at

**[pspcourses@bah.com](mailto:pspcourses@bah.com)**